



## Great Giving Funders Award

### Name of organisation or individual nominated

Lloyds TSB Foundation for England and Wales. This year the Foundation celebrates its 25th anniversary. The Foundation funds local, regional and national charities working to tackle disadvantage across England and Wales. In 2010 we awarded £23.4million via 908 grants. [www.lloydstsbfoundations.org.uk](http://www.lloydstsbfoundations.org.uk)

### 1. What have you done to demonstrate a clear understanding of your beneficiaries and the funding environment? (maximum 200 words)?

The Foundation remains one of the very few grant makers which provides support towards much needed core costs - 70% of our funding goes towards this – at a time when charities are struggling to maintain basic services. As a needs driven funder, we fund based on what charities tell us they need, not what we think they need, as we recognise they are the experts in their field, however, we expect charities to be able to measure the impact of their work. As a result, we conducted a review of our flagship Community programme to identify the impact of our support. All charities could demonstrate the changes and benefits their work had on beneficiaries/users including reducing isolation of individuals, improved access to support networks, improved confidence and self esteem and improved basic skills such as numeracy and literacy, reinforcing the positive impact core funding has on communities. In the last three years, we have supported 2,500 jobs and over 12,500 volunteering opportunities, we have provided support across 97% of local authorities, and over 49% of our funding has been targeted towards the top 20% most deprived areas ensuring we provide stable and sustainable funding for those communities which need it most.

### 2. How were you able to demonstrate your application and understanding of your grant making to give clear guidance and support? (maximum 200 words)

We have developed a simple grant making process based around the approach of 'Total Grant Care', designed to work with charities from initial enquiry through the lifetime of a grant. It is a consistent and transparent approach which begins with a short online eligibility questionnaire clearly setting out our guidelines and giving charities an immediate answer as to whether they are eligible for funding or not, to avoid any unnecessary waste of resources for applicants. We have a team of highly trained Grant Managers across England and Wales who visit eligible charities applying for funding of over £5,000 to gain

greater understanding of their work, and providing a high level of guidance and support irrespective of the outcome of their application. In 2010 we visited over 1,200 eligible charities to give advice and personal assistance on how to apply for funds or to suggest other appropriate funders if necessary. Once a grant is awarded, grant managers are always on hand to provide support, charities have to regularly complete grant monitoring reports, and we undertake monitoring visits to enable continued learning from our grant making. This approach and high level of personal service is unique in the grant making arena.

### **3. What was your response to your applicants' needs or changes in the wider environment? (maximum 200 words)**

Through our process of 'Total Grant Care' we gain a thorough understanding of the needs of the charities and how the wider environment impacts upon them. Our system of approving grants through peer review meetings allows us to adapt, learn and share best practise, and to respond appropriately and quickly to the needs of the charities on a month by month basis. We also work closely with other grant making organisations to share our knowledge and experiences of the sector. This year, many charities have been unable to provide strong indications of future financial sustainability, but through our peer review process we have been able to agree a more flexible approach to ensure charities that have good planning and management in place are not penalised because of the challenging economic environment. To gain a greater understanding of the impact of the wider environment we have again launched 'The Funding Environment for Smaller Community Based Charities' survey to give a clearer indication of the needs of charities at this difficult time. This will enable us to act accordingly and ensure our funding continues to meet the needs of charities as we start to develop our strategic plan for 2012 and beyond.

### **Additional Nomination Comments from others**

This organisation, especially Gary Beharrell the Grants Manager for the East Midlands, has ensured that they have raised the profile of the fund and made the process more accessible to community organisations by attending sessions to disseminate information about their grant and the process to completing the application forms etc. Gary has been very interested in the organisations that have made contact with him and in our case he has visited us to find out more about the project that we intended to submit a bid for before we actually did. Their whole approach has been very understanding and thought provoking so that we had a very clear picture of what we wanted to deliver and could communicate that in our application. He helped us to turn our passion into reality.

This organisation is accessible, easy to communicate with and has an uncomplicated application procedure. They are also prepared to

**support core costs which is so essential for many smaller charities who are not forever creating new projects but need to maintain existing ones that benefit local communities.**